

access (TSSMS) passwords prior to their expiration every ninety (90) business days. In addition, The Contractor shall take steps to ensure that, in the event of circumstances beyond the Contractor's control, such as power outages or natural disasters, back-up systems are available to safeguard the Contractor's ability to access EPA servers. The Contractor shall provide these steps to EPA WACOR. In the event of back-up system failure, The Contractor shall be prepared to work, under technical direction provided by the WACOR, with IT staff at EPA to maintain the accessibility of the program website.

**Task 5.3 Monitor Developments in EPA Web Policy:** The Contractor shall monitor, with the assistance of EPA staff, the progress of any and all initiatives within the Office of Water, Office of Environmental Information and the Office of External Affairs and Environmental Education as well as other offices aimed at making changes to the technical requirements related to the maintenance of an EPA website. Such requirements may include but are not limited to content management systems (CMS), cascading style sheets (CSS), and special guidelines developed for use by partnership programs only. Accordingly, the Contractor shall take all such initiatives into account when maintaining the existing website or making plans for future development. The Contractor shall notify the WACOR in writing of any such changes likely to impact the WaterSense site within fifteen (15) business days.

#### **Task 6 Work Assignment Management.**

The Contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone as needed. For planning purposes, the Contractor should assume that such meeting will consume approximately two hours per month. The Contractor shall provide a status update for tasks via email two days before each meeting. The Contractor shall meet with the WACOR on specific issues related to proper functioning of the site and the servicing of the audiences' needs more frequently as directed by the WACOR. Contractor should plan on one such meeting per quarter.

#### **IV. DELIVERABLE SCHEDULE:**

<b>Task</b>	<b>Subtask</b>	<b>Deliverable</b>	<b>Due Date</b>
<b>0</b>		Work plan	Per contract requirements
<b>1</b>	1.1	Website Maintenance	Ongoing
	1.2	Ensure the Accuracy of Site Content	Ongoing
	1.3	Maintain and Expand Site	Ongoing
	1.4	Ongoing Technical Recommendations	Ongoing
<b>2</b>	2.1	Maintain List of Items and Files Required	Immediately upon receipt of update list
	2.2	Perform Regular Website Updates	5 business days after

			receipt of update list
	2.3	Adhere to Update Review Process	5 business days after receipt of update list
	2.4	Perform Additional Updates as Needed	1 business day after receipt of comments from WACOR
<b>3</b>	3.1	Connect WaterSense CRM to Public Site	Ongoing
	3.3	Develop SOP for Salesforce Output	End of period of performance
<b>4</b>		Provide Monthly Website Statistics	Within 10 business days of the end of the month
	4.1	Provide a report summarizing website activity	End of period of performance
<b>5</b>	5.1	Comply with EPA Web Guide	Ongoing
	5.2	Ensure Security Standards on EPA Servers	Ongoing
	5.3	Monitor Developments in EPA Web Policy	Ongoing
<b>6</b>		Work Assignment Management	Bi-monthly

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. All documents shall be provided first as drafts. EPA may provide comments for the Contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the Contractor in advance. The Contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

The Contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than fifteen (15) business days after the Contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the Contractor will be notified that no revisions are required.

## **V. MISCELLANEOUS**

### **A. Software Applications and Accessibility.**

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 8.0



**B. Travel.**

Travel will not be required in completion of this work assignment.

**C. Release of Data and Information.**

All information collected and developed under this Work Assignment is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

**D. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

**E. Contractor identification**

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

**F. Technical Direction**

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Performance Work Statement, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

**G. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

## **VII. QUALITY ASSURANCE SURVEILLANCE PLAN**

The contract level QASP applies to this work assignment.

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-04				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period 07/18/2014 To 02/13/2017 Base                      Option Period Number    2			Title of Work Assignment/SF Site Name WaterSense Web Support				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.3, 3.4					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval						Period of Performance  From 02/14/2016 To 02/13/2017				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund         <span>Accounting and Appropriations Data</span> <input checked="" type="checkbox"/> Non-Superfund       </div>										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO <input type="checkbox"/> (Max 2)										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee: \$0.00		LOE: 0						
07/18/2014 To 02/13/2017										
This Action:		\$110,439.00		1,166						
Total:		\$110,439.00		1,166						
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:		Cost/Fee \$110,439.00		LOE: 1,166						
02/26/2016										
Cumulative Approved:		Cost/Fee \$110,439.00		LOE: 1,166						
Work Assignment Manager Name    Jonah Schein  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 202-564-2720 FAX Number:				
Project Officer Name    Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:				
Other Agency Official Name    Lisa Mitchell-Flinn  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2852 FAX Number:				
Contracting Official Name    Noelle Mills  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:				

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-05				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period   07/18/2014   To   02/13/2017 Base                      Option Period Number    2			Title of Work Assignment/SF Site Name Technical Support				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance  From   02/14/2016   To   02/13/2017				
Comments: NTE Ceiling \$400,000.00										
<input type="checkbox"/> Superfund                      Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO <input type="checkbox"/> (Max 2)										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:		LOE:						
07/18/2014   To   02/13/2017				0						
This Action:				7,450						
Total:				7,450						
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee		LOE:				
Cumulative Approved:				Cost/Fee		LOE:				
Work Assignment Manager Name    Stephanie Tanner						Branch/Mail Code:				
_____ (Signature)                      (Date)						Phone Number: 202-564-2660				
						FAX Number:				
Project Officer Name    Robin Danesi						Branch/Mail Code:				
_____ (Signature)                      (Date)						Phone Number: 202-564-1846				
						FAX Number:				
Other Agency Official Name						Branch/Mail Code:				
_____ (Signature)                      (Date)						Phone Number:				
						FAX Number:				
Contracting Official Name    Sandra Stargardt-Licis						Branch/Mail Code:				
_____ (Signature)                      (Date)						Phone Number: 513-487-2006				
						FAX Number:				

## **PERFORMANCE WORK STATEMENT**

**Contract # EP-C-14-014**

**Work Assignment No. 2-05**

### **I. ADMINISTRATIVE**

**A. Title: WaterSense® Product Development and Technical Support**

**B. Period of Performance: 2/14/16-2/13/17**

**C. Work Assignment Contracting Officer Representative (WACOR)**

<b>Work Assignment Contracting Officer Representative Stephanie Tanner 1200 Pennsylvania Ave, NW MC 4204-M Washington, DC 20460 202-564-2660 Phone 202-501-2396 Fax</b>	<b>Alternate WACOR Jonah Schein 1200 Pennsylvania Ave, NW MC 4204-M Washington, DC 20460 202-564-2720 Phone 202-501-2396 Fax</b>
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### **D. Quality Assurance**

The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required. The Contractor created a PQAPP for data and information collected under both WA B-01 and WA B-05. This PQAPP will be acceptable to meet the requirements under this WA.

### **E. Background**

The WaterSense program is a voluntary partnership program to enhance the market for water-efficient products and practices. The program seeks to provide information to residential and commercial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

## **II. OBJECTIVE**

The objective of this work assignment is to obtain technical support in the evaluation of water-using products, systems, services and activities for their potential inclusion in the WaterSense program. EPA requires an in-depth understanding of both the technology, system or service and the market place in order to make decisions about market enhancement. This work assignment will

provide research on products and services, development of specifications, conformity assessment and assistance with technical outreach to stakeholders.

For each of the following tasks EPA will make results of previous research and program development materials available as necessary. For all tasks, the contractor shall provide all source files and content to EPA with final deliverables. For each of the following tasks the contractor shall be responsible for coordinating certain activities with other EPA offices or other organizations outside of the EPA. When the contractor is responsible for coordinating activities with the EPA or other outside organizations, the contractor should be certain to communicate that they are working as an EPA Contractor. The contractor must be familiar with EPA's Office of Public Affairs guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables should comply with those requirements.

### **III. TASK DETAILS**

The contractor shall perform the following tasks:

#### **Task 1 - Work Plan, Program Planning, Funds Tracking and Management**

*Task 1.1 Work Plan* – The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables.

*Task 1.2 Funds Tracking and Management* – This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70). The budget for this work assignment shall be tracked at the task level. The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two hours per month to discuss work assignment planning issues. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for a maximum of twelve (12) times. The contractor shall also maintain a milestone chart or other tracking system for projects underway as part of this WA.

*Task 1.3 Program Planning* – The contractor shall assist the WaterSense program in developing a five (5) year plan for the technical program. The task will include organizing meetings with ten to fifteen (10-15) stakeholders to obtain feedback on program successes and future direction. The contractor shall develop meeting agendas, summarize findings and work with EPA to refine feedback into a plan that may include a framework for screening projects, goals for products, systems and services and other activities to be undertaken by the

program. The technical plan should complement the overall program plan, goals and objectives.

## **Task 2 – Product Screening and Research**

Under this task the contractor shall conduct research on products and services for inclusion in the WaterSense program. This research will be the basis for determining if development of a specification is necessary under Task 3. Under this task area the contractor shall complete the preliminary screenings and detailed assessments described below. For each product or service, a draft and final report shall be completed.

*Task 2.1 Product Screening and Pipeline Management* – The contractor shall update and maintain the WaterSense product screening tool. The product screening tool is a spreadsheet used by the WaterSense program to prioritize products for detailed research and possible specification development. The contractor shall collect information on new water efficient product for consideration by the WaterSense program. New products can be identified from a number of sources including, but not limited to, conferences, trade shows, helpline inquiries, and technology magazines. On an annual basis the contractor shall update the tools to ensure that product information is current. The screening shall look at the overall technical and market situation of products and be based on easily available information including, water use, water saving, payback periods, national sales figures, status of standards and testing protocols. The contractor shall meet with the WACOR to review the revised tool and discuss new program priorities. This meeting should be held within one (1) month of the tool revision. The contractor shall expect to update the screening tool once as part of this work assignment.

*Task 2.2 Technical Assessments and Market Research Report* – The contractor shall complete research that provides a broad understanding of identified product categories and specific products. This information should build on information gathered during the preliminary screening. Information developed at this level should inform the specification development and conformance assessment process. This assessment shall be used to determine which products will actually be included in the WaterSense program and what the appropriate market mechanism will be. This phase of the research should conclude with a research report for the program. The research should cover the topics outlined in the WaterSense Specification Development Guidelines (Guidelines).<sup>1</sup>

The contractor shall continue work begun under WA 1-05 (EP-C-14-014) to develop reports on tub diverters, kitchen and metering faucets, hybrid urinals and dipper wells. The contractor shall be expected to complete no more than five (5) draft reports and four (4) final reports as part of this work assignment. The contractor shall attend and participate in seven to eight (7-8) meetings taking

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<sup>1</sup> ERG is already in possession of the Specification Development Guidelines

place locally or via conference call or webinar. The EPA WACOR will give the contractor at least two (2) weeks' notice of expected meeting dates and times.

### **Task 3 - Product Development and Management**

The EPA has selected a number of products for further development based on work completed under Contract EP-C-09-008. The contractor shall work with EPA to engage a broad spectrum of stakeholders including: (non-government organizations) NGOs, trade and professional associations, products manufacturers, service providers, conformance assessment bodies, standard setting bodies and utilities. Input from stakeholders can be obtained from a range of mechanisms as appropriate. These mechanisms can range from simple conference calls to formal meetings. The contractor shall have a system in place for tracking and managing input from stakeholders and the general public. This process is highly dependent on the industry and complexity of the technology, but should follow the instructions outlined in the Guidelines supplied to the contractor under Task 2 (WaterSense Specification Development Guidelines). Detailed information on the development of the documents in this section is included in the Guidelines. The contractor should also develop tracking material for each task as necessary. The contractor may need to attend non-local meetings with relevant stakeholders for information gathering purposes as part of this task. The contractor can expect to attend five to seven (5-7) meetings of one to three (1-3) days each as part of this task. The WACOR will provide at least two (2) weeks' notice of any meeting. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings.

*Task 3.1 Notice of Intent (NOI)* – This is the process by which WaterSense formally declares its intent with respect to products. Where a NOI was issued under a prior work assignment, the contractor shall continue the NOI process for this product. The main objective of this process is to engage the stakeholder community and obtain information needed to fully develop a specification or another WaterSense output document. The contractor can expect to work on up to four (4) NOIs as part of this WA. It is also possible that one (1) of these products may not be completed due to technical issues; in that event the WACOR will inform the contractor on a replacement product or task consistent with this WA via a work assignment amendment.

*Task 3.2 Draft Specifications* – Once WaterSense has answered the outstanding questions in the NOI, the specification development process can begin. When directed by the WACOR, the contractor shall develop the draft specification in accordance with the Guidelines supplied to the contractor under Task 2 (WaterSense Specification Development Guidelines) and based on information developed during the research and NOI phases. This process shall require the contractor to coordinate up to three public meetings of two to three (2-3) hours, as appropriate to handle comments from the stakeholder community. These meetings will take place via webinar or at another industry event so that



contractor will not need to rent or locate space for the meetings. In addition the contractor shall prepare the Supporting Statement which summarizes the intent of the specification, research and cost effectiveness of the proposed specification and other documents as described in the Guidelines. The contractor can expect to complete up to four (3) Draft Specifications for products as part of this work assignment.

*Task 3.3 Final Specifications* – At the conclusion of the draft specification comment period the contractor shall begin development of a final specification. The contractor shall develop the final specification in accordance with the Guidelines supplied to the contractor under Task 2 (WaterSense Specification Development Guidelines) and based on additional information gathered or any further research identified during the comment period. This process shall generally include review and adjudication of all comments received, development of a plan for and conducting any further research needed to complete the specification. The contractor can expect to complete up to three (3) Final Specification for products as part of this work assignment.

*Task 3.4 Technology Assessment Guide* – If WaterSense determines that a specification is not appropriate for a product, then the contractor shall develop a Technology Assessment Guide for use by Water efficiency practitioner. The Guide shall be a useful summary of the research obtained and provide information to building managers and utilities on appropriate uses of the technology, installation guidance as appropriate and cost effectiveness information. The contractor can expect to complete one (1) Technology Assessment guide as part of this work assignment.

*Task 3.5 Specification Updates* – Due to technological changes in existing standards and other market factors some minor adjustment to the language of a number of existing specifications needs to be made. The contractor shall work with manufacturers, utilities and other stakeholders to update the existing specifications as determined by the WACOR. Where appropriate the contractor shall also work with the ASME standards committees and DOE on adjustments to the language. The contractor can expect to update the specifications listed for bathroom faucets, showerheads and possibly 2-3 others, which may require up to two (2) meetings each via webinar.

*Task 3.6 Standards Development Committee Participation* – The contractor shall continue to participate in standards committees relevant to WaterSense specification or activities. In this capacity, the contractor shall work with the committee to develop a schedule for developing specifications, coordinate with committee members, analyze data relevant to WaterSense, and review materials developed by the committee. Standards Committee may include:

- ASME/CSA (Canadian Standards Association) Joint Harmonization Task Group or other committees for plumbing fixtures and fittings as needed by specification development and management tasks.
- ASABE committee on landscape irrigation emission devices and committee on smart irrigation controllers

As part of this work assignment it is expected that the contractor will participate in product standard setting committees for up to three (3) products. The contractor shall participate in three- five (3-5) total meetings in person or via conference call or webinar. The EPA WACOR will give the contractor at least two (2) weeks' notice of expected meeting dates and times. Many of these meetings can be combined with meetings identified in other sub tasks at the direction of the WACOR.

#### **Task 4 - Product Certification**

In order to ensure that products and services bearing the WaterSense label meet the specification criteria, WaterSense requires third party certification of products. To support this process WaterSense has developed and published the WaterSense Product Certification System. The system provides a rigorous protocol for determining directly or indirectly that relevant requirements in WaterSense specifications are fulfilled.

*Task 4.1 Certification Scheme Management*– The contractor shall maintain and revise as necessary the controlling documents for the Certification Scheme including, licensing agreements, ad hoc guidance to accreditation organizations and certification bodies, Product Notification Templates and the website. The contractor can expect to maintain up to twenty (20) certification documents as part of this work assignment.

*Task 4.2 Certification Audit* – The contractor shall continue the audit of the certifications system begun under EP-C-14-014 WA 1-05 by developing a report summarizing the finding of that audit. The contractor shall then develop a plan for further auditing the certification program based on the findings in this and previous audit done under 1-05, the plan should indicate whether on site visits will be required. This audit will include up to four (4) Licensed Certification Bodies (LCB) and one-two (1-2) products categories. The contractor shall work with the selected LCBs, collect and review the necessary information and prepare a report summarizing the findings. The contractor shall make recommendation for changes to procedures or additional training necessary to correct any deficiencies found in the audit. If on-site audit are required, the contractor should plan for three (3) trips of two (2) days to travel to audit of the LCB in person.

#### **Task 5 - Technical Product Support and Outreach**

The objective of this task is to support products launched under the WaterSense program. Items identified here are potential areas for support; actual activities

under this task will be based on the needs of the WaterSense program as they develop. The contractor may need to attend non-local meetings with relevant stakeholders for information gathering purposes as part of this task. The contractor can expect to attend one to two (1-2) meetings of one to two (1-2) days each as part of this task. The WACOR will provide at least two weeks' notice of any meeting. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings.

*Task 5.1 Green buildings* – EPA is working with a number of organizations to include water efficiency in the requirements for high-performing new and existing buildings. The contractor shall provide support such as reviewing other green building standards and codes as needed for this effort. The contractor can expect up to five (5) requests for support throughout the year.

*Task 5.2 Marketing and technical outreach* – the contractor's technical team staff will coordinate with marketing team staff to develop outreach strategy and materials for technical professional and trade audiences such as architects, engineers, plumbers, facility manager or landscapers. The contractor shall develop outreach materials and activities that correctly reflect the technical aspects of the program and meets the needs of the chosen target audience. This can include media information requests, web content, webinar content and support, presentations and conference papers. The contractor may also be required to attend conferences, tradeshow or other meetings to educate stakeholders on WaterSense. The contractor can expect up to ten (10) requests for support throughout the year. Webinars and presentation will be no longer than one (1) hour.

*Task 5.3 Miscellaneous technical support* – From time to time questions from stakeholders arise about WaterSense products, other water efficiency products and services and other technical issues. The contractor can expect up to ten (10) requests for support to answer questions throughout the period of performance. The contractor and the WACOR shall agree on an appropriate response time based on the complexity of the support required.

*Task 5.4 Energy Star Program Coordination* – The contractor shall work as needed with Energy Star to develop water criteria for energy and water using products. Activities may include, attending stakeholder workshops, review of products reports and proposed criteria and developing recommendations for new water efficiency criteria. The contractor can expect two to four (2-4) requests for support throughout the year. It is expected that attending the workshops will not require any non-local travel on the part of the contractor.

*Task 5.5 Life-cycle Analysis* – The contractor shall perform life-cycle analyses on potential WaterSense products. The analysis shall conform to either ISO 14040 series and/or ASTM D7075 standards, as appropriate. The contractor can expect

up to two (2) requests for support throughout the period of performance of this work assignment.

*Task 5.6 Metrics and Modeling* – The contractor shall continue to maintain and update the factoid catalog developed under EP-C-09-008 WA 4-05. Support for this task shall include addition of new facts as directed by the WACOR and revision of the data set with new price or water metric data if available. The contractor should coordinate with the marketing staff to finalize factoid language and generate messaging for outreach materials such as media, presentations and articles. The contractor may expect development of five to six (5-6) new facts for the catalog during the performance period.

*Task 5.7 Product Deployment Strategy and Implementation* – WaterSense develops strategies and methods to deploy each of its labeled product categories. To help ensure the successful launch of WaterSense's commercial products, the Contractor shall develop a short strategy to most effectively deploy CI products. For purposes of estimation, the contractor shall expect to develop 2-3 strategies of approximately five (5) pages each. The strategy shall include target decision-makers and audiences in the commercial product procurement chain, The Energy Star programs CI efforts and relevant trade publications, and other market factors that would affect the launch of these WaterSense labeled products. After the approval of the strategy, the contractor shall implement the strategy as directed by the WACOR. In addition, the contractor shall continue to implement the deployment strategy for flush valve HETs, flushing urinals and Pre-Rinse Spray Valves that were developed and approved under the previous contract EP-C-09-008 and WA B-05 and 01-05 under this contract.

## **Task 6 – New Homes Specification and Certification System Management**

For this task, the Task Manager is Jonah Schein, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR.

The objective of this task is to support the WaterSense Labeled Homes Program launched under the WaterSense program. Items identified here are potential areas for support; actual activities under this task will be based on the needs of the WaterSense New Homes program as it develops. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. Possible areas of support include:

*Task 6.1 New Homes Specification Management* – From time to time questions from stakeholders arise about WaterSense specifications, other water efficiency

products and services and other technical issues. Occasionally, these will result in the need for modifications or clarifications to the New Homes Specification documents. The contractor can expect up to twenty (20) requests for support to answer questions throughout the period of performance and one – two (1-2) modifications/clarifications to the specification documents throughout the period of performance. The contractor and the WACOR shall agree on an appropriate response time based on the complexity of the support required. The contractor will also compile a summary of these activities prior to the end of the period of performance.

*Task 6.2 New Homes Certification System* – To ensure that homes bearing the WaterSense label meet the specification criteria; WaterSense requires third party certification of homes. To support this process WaterSense has developed and published the WaterSense New Homes Certification System. The system provides a rigorous protocol for determining directly or indirectly that relevant requirements in WaterSense specifications are fulfilled.

- a. Certification System Document – The contractor shall maintain and revise as necessary the controlling documents for the Certification system including, licensing agreements, ad hoc guidance to administrators, Certification providers and auditors. The contractor can expect to maintain up to twenty-five (25) certification documents as part of this work assignment.
- b. Periodic Reports – The contractor shall review and analyze Certification Provider Quarterly reporters and Builder annual reports for use by EPA in managing the system and informing future decisions. Based on information in the reports and guidance from the WACOR the contractor shall prepare a recommendation for any changes to the Certification system needed to improve management of the program. The contractor shall also prepare a summary of issues identified by the helpline or other stakeholders to provide to Program administrators as part of their assessment process.
- c. Training – The contractor shall provide training as necessary to Certification Program Administrators and providers on the new homes certification systems. They shall use the presentations and other materials developed under the Work Assignment 3-05, 4-05, and 5-05 of EP-C-09-008.

*Task 6.3 New Home Builder Resource Manual & Training Materials*– The contractor shall maintain the timeliness and accuracy of the Builder Resource Manual completed under WA 1-02, EP-C-09-008 as well as supplemental training materials.

- a. Builder Resource Manual – The manual shall be updated to reflect any changes made to the New Homes specification under task 6.2 or 6.3. The

contractor shall receive technical direction from the WACOR when changes are deemed substantial enough to warrant updating the resource manual and the contractor and WACOR shall agree on appropriate response time in these instances.

- b. Training Materials – The contractor shall prepare additional technical training materials to support the adoption of WaterSense Labeled Homes and water-efficient building practices throughout the residential construction industry. The contractor shall receive technical direction from the WACOR when such materials become necessary. The contractor shall also identify opportunities to educate builders and associated trade professionals at existing forums and venues where the target audience is known to attend. The contractor and WACOR will agree on appropriate venues as well as appropriate deadline for the related material.

### **Task 7 – Commercial Building Support**

The WaterSense Program will provide information and guidance to the CI sector on water efficiency and management. For this task, the Task Manager is Tara O'Hare, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including, but not limited to, citation of data sources and an explanation of calculations and terms. In order to support this, the Contractor shall complete the following tasks:

*Task 7.1 General CI Materials* – The Contractor shall revise and modify existing materials on water efficiency in the CI sector for use in association with the WaterSense program. Specifically the contractor shall support ongoing outreach to CI sector facilities and collaboration with the ENERGY STAR program to educate CI facilities on water efficiency. Outreach will include the wrap up of 2015 H2Otel Challenge activities and the development and modification of materials applicable to all CI facilities for use in 2016 and beyond. In addition, the Contractor shall assist EPA in incorporating WaterSense information into materials for ENERGY STAR Commercial and Institutional building partners. All existing materials will be provided by the WACOR. The Contractor shall also develop new materials to assist specific stakeholders such as building owners, architect and engineering firms, and facility managers to implement water efficiency in CI buildings. This shall include the revision and creation of approximately ten to fifteen (10-15) materials such as factsheets, frequently asked questions, talking points, web content, presentation slides, key messages, e-mails to partners, program announcements, and press releases among other pieces during the period of performance. When applicable, final materials shall be delivered in print ready format and a format ready to be coded for placement



on the WaterSense website. The Contractor shall use the materials developed in this task to assist the WaterSense program in conducting outreach to CI buildings via emails, trade articles, webinars, or press releases. For purposes of estimation, twenty to thirty (20-30) outreach activities are expected during this period of performance.

*Task 7.2 CI Tools and Resources* – The Contractor shall continue to provide support for the development and consolidation of tools and resources to assist CI facilities save water. This effort started under WA B-05 and 1-05 and will continue in this period of performance. The Contractor shall develop and modify existing tools and resources for use by CI facility owners and managers. Example tools and resources include checklists, worksheets, tip sheets, and case studies. Each item is expected to be approximately two to four (2-4) pages in length. All tools and resources will be derived from existing content and materials provided by the WACOR. Case studies will be developed in conjunction with speakers from the BMP webinars in Task 7.4 of this WA and will be completed in the format developed under WA B-05 and 1-05. For purposes for estimation, approximately ten to fifteen (10-15) items are expected during this period of performance.

The Contractor shall continue to provide support to the WaterSense team in compiling existing tools and resources in a centralized location on the WaterSense website. The support shall be limited to compiling the information submitted to WaterSense under the previous WAs by established CI programs and other relevant stakeholders and reorganizing existing tools and materials created as part of the H2Otel Challenge and other previous CI-related activities. Most of the information used in this effort has already been received or developed, so minimal research will be required. The Contractor shall use this information to update existing content on the WaterSense website. For purposes of estimation, updated content for approximately ten to fifteen (10-15) web pages is expected during this period of performance. The web pages will be posted under the Web Support WA 1-04, not this work assignment. A written summary report will not be required for this task.

*Task 7.3 Commercial Water Use Savings and Evaluation Tool* – The Contractor shall continue to support and maintain the Water Use Savings and Evaluation Tool (WaterUSE Tool) developed under WA B-05 and 1-05. The WaterUSE Tool was created to assist facility managers, owners and other stakeholders in tracking their water use and calculating their potential savings and payback. The Contractor shall complete minor updates to the Tool version 1.0 to incorporate user feedback as directed by the WACOR.

*Task 7.4 WaterSense Best Management Practice Webinars* – The contractor shall develop a series of webinars in collaboration with ENERGY STAR based on the content developed in the *WaterSense at Work: Best Management Practices for CI Facilities* and the H2Otel Challenge webinars created under WA B-05 and

1-05 of this contract. The contractor shall create and outline, draft presentation, and final presentation for each webinar that will include content for a specific portion of the BMPs and a case study from a facility that has completed water efficiency projects in those areas. Most of the content for the webinars was already developed under WA B-05 and 1-05 and will be reorganized to educate ENERGY STAR partners and other CI building stakeholders on the BMPs and WaterSense. Each webinar will be approximately 1.5 hours in length. The contractor shall be responsible for presentation development and delivery. All other logistics will be completed by ENERGY STAR. The final deliverables shall be a 508-compliant files in a format determined by the WACOR. The development of approximately six (6) webinars will be required during the period of performance.

The Contractor shall also develop content for short webinars to introduce CI stakeholders to WaterSense and specific concepts of water-efficiency in CI facilities not otherwise covered in the BMP webinars described above. The Contractor shall develop and update content for these webinars based on existing presentations and information from the BMPs. Each webinar is expected to be approximately ten to thirty (10-30) minutes in length. The Contractor will not be responsible for webinar logistics other than presentation development. For purposes of estimation, approximately eight (8) short webinars will be required during this period of performance.

### **Task 8 – Benchmarking and whole building analysis**

The WaterSense Program will provide technical support to the CI sector on water efficiency and management including the development of water use benchmarks for CI buildings. For this task, the Task Manager is Jonah Schein, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. The Contractor shall support this portion of the program by completing the following tasks:

*Task 8.1 ENERGY STAR Portfolio Manager Revisions* – The ENERGY STAR program is currently revising, expanding, and enhancing their Portfolio Manager tool used by a variety of building types. The Contractor shall continue to assist the WaterSense team in working with ENERGY STAR on changes and additions to the Portfolio Manager specific to WaterSense and water efficiency in CI buildings. As directed by the WACOR, the Contractor shall develop a list of recommended changes to be submitted to ENERGY STAR. The Contractor shall



also provide technical support to the WaterSense team as the changes are implemented by answering questions and providing clarifications when needed within one week of receipt from WACOR.

*Task 8.2 Development of a Water Efficiency Benchmark Pilot Program* –The objective of this task is to develop and technical methodology for a water efficiency benchmark for water efficiency in multi-family, commercial and institutional buildings as well as to implement this methodology in the market. The benchmark would be compatible with the ENERGY STAR energy use efficiency benchmark. The evaluation would consider whether data being collected from the Energy Information Administration, Fannie Mae or other sources would be useful for purposes of developing a 1-100 benchmark for water use in CI buildings.

#### **IV. DELIVERABLE SCHEDULE (by tasks/subtask and due date)**

The deliverables for this task are highly dependent on the progress and coordination of work with outside stakeholders. All activities shall begin based on WACOR direction unless otherwise noted. Due dates for draft documents are identified in the tables below. The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than fifteen (15) business days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

#### **Task 1 – Work Plan, Funds Tracking and Work Assignment Management<sup>2</sup>**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
1.1	Work Plan and PQAPP	Per contract requirements.

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<sup>2</sup> This WA contains number of activities based on EPA research and work with other committees. Since EPA has little to no control over the committee schedules, deadlines are set based on information at the time. This flexibility has worked extremely well for both the contractor and the WACOR under EP-C-14-014.

1.2	Funds Tracking and WA Management	Monthly
1.3	Program Planning	Meetings within 1 week of WACOR direction

## **Task 2 - Product and Service Research**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
2.1	Product Screening Tool	Within 20 business days of WACOR direction
2.2	Technical Assessment and Market Research	Within 60 calendar days of WACOR direction

## **Task 3 - Product Development and Management**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
3.1	Notice of Intent	Within 30 business days of WACOR direction
3.2	Draft Specification material	Within 60 business days of WACOR direction
3.3	Final Specification material	Within 60 business days of WACOR direction
3.4	Technology Guide	Within 45 business days of WACOR direction
3.5	Specification Updates	Within 30 business days of WACOR direction
3.6	Standards Development Committees	Ongoing

## **Task 4 – Product Certification**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
4.1	Certification document management	Within 20 business days of WACOR direction

4.2	Certification Audit	Within 20 business days of WACOR direction
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#### **Task 5 – Technical Product Support and Outreach**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
5.1	Green building program support	As directed by the WACOR
5.2	Marketing and outreach	As directed by the WACOR
5.3	Miscellaneous technical support	As directed by the WACOR
5.4	Energy Star program coordination	As directed by the WACOR
5.5	Life-cycle analysis	As directed by the WACOR
5.6	Factoid Catalog updates	As directed by the WACOR
5.7	Product deployment strategy and implementation	As directed by the WACOR

#### **Task 6 – New Homes**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
6.1	Specification Management	As directed by the WACOR
6.2	New homes certification system management	As directed by the WACOR
6.3	Builder resource manual and training	Within 60 business days of WACOR direction or as agreed to as reasonable by contractor and WACOR

#### **Task 7 – H2OTel Challenge**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
7.1	General CI materials	Within 3 weeks of WACOR direction
7.2	CI Tools	Within 3 weeks of WACOR direction

7.3	Water Use Savings and Evaluation Tool	Within 5 weeks of WACOR direction
7.4	Outline of Content for Webinar	Within 3 weeks of WACOR direction
	Draft Presentation	Within 4 weeks of WACOR direction
	Final presentation	Within 2 weeks of WACOR direction

## **Task 8 – Benchmarking and Whole-Building Analysis**

<b><i>Subtask</i></b>	<b><i>Deliverable</i></b>	<b><i>Due Date</i></b>
8.1	Portfolio Manager Support	As directed by the WACOR
8.2	Benchmarking & Data Analysis	As directed by the WACOR

## **V. MISCELLANEOUS**

### **A. Software Applications and Accessibility**

Files delivered to the Government shall be Microsoft Office 2013 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word,
- Preferred presentation format: Power Point
- Preferred graphics format: Each graphic is an individual JPEG or GIF file
- Preferred portable format: Adobe Acrobat, Version X
- Preferred tracking format: MS project or excel

**B. Travel.** Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. . The WACOR will provide at least a two week notice of any non-local travel. For planning purposes, the contractor shall assume 6 (six) to 9 (nine); 2 (two) -3 (three) day trips will be required over the course of this Work Assignment as described in Task 3 and 5 above. One to two contractors shall attend each

conference under this work assignment (though other WACORs may request additional support under their own work assignments).

### **C. Release of Data and Information.**

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the Contracting Officer. Information from this task shall be included in the program database (Salesforce), as appropriate. Updates to the database shall include communications with Stakeholders such as e-mails and meeting summaries.

### **D. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

### **E. Contractor identification**

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

### **F. Technical Direction**

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and

approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

#### **G. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

#### **VI. QUALITY ASSURANCE SURVEILLANCE PLAN**

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment. The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required. The Contractor created one PQAPP for data and information collected under both WA B-01 and WA B-05. This PQAPP will be acceptable to meet the requirements under this WA.

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-05	
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:	
Contract Number EP-C-14-014		Contract Period   07/18/2014   To   02/13/2017 Base                      Option Period Number    2		Title of Work Assignment/SF Site Name Technical support for WaterSen			
Contractor EASTERN RESEARCH GROUP, INC.				Specify Section and paragraph of Contract SOW 3.3, 3.4			
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval						Period of Performance  From   02/14/2016   To   02/13/2017	
Comments: NTE ceiling of \$400,000							
<input type="checkbox"/> Superfund    Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund							
SFO <input type="checkbox"/> Note: To report additional accounting and appropriations date use EPA Form 1900-69A. (Max 2)							
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)    (Cents)    Site/Project (Max 8)    Cost Org/Code
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2							
3							
4							
5							
Authorized Work Assignment Ceiling							
Contract Period:		Cost/Fee: \$0.00		LOE: 0			
07/18/2014 To 02/13/2017							
This Action:		\$765,445.00		7,423			
Total:		\$765,445.00		7,423			
Work Plan / Cost Estimate Approvals							
Contractor WP Dated: 02/25/2016		Cost/Fee \$765,445.00		LOE: 7,423			
Cumulative Approved:		Cost/Fee \$765,445.00		LOE: 7,423			
Work Assignment Manager Name   Stephanie Tanner						Branch/Mail Code:	
<div style="border-bottom: 1px solid black; width: 100%;"></div> <div style="display: flex; justify-content: space-between;"> <span>(Signature)</span> <span>(Date)</span> </div>						Phone Number: 202-564-2660	
						FAX Number:	
Project Officer Name   Robin Danesi						Branch/Mail Code:	
<div style="border-bottom: 1px solid black; width: 100%;"></div> <div style="display: flex; justify-content: space-between;"> <span>(Signature)</span> <span>(Date)</span> </div>						Phone Number: 202-564-1846	
						FAX Number:	
Other Agency Official Name   Lisa Mitchell-Flinn						Branch/Mail Code:	
<div style="border-bottom: 1px solid black; width: 100%;"></div> <div style="display: flex; justify-content: space-between;"> <span>(Signature)</span> <span>(Date)</span> </div>						Phone Number: 513-487-2852	
						FAX Number:	
Contracting Official Name   Sandra Stargardt-Licis						Branch/Mail Code:	
<div style="border-bottom: 1px solid black; width: 100%;"></div> <div style="display: flex; justify-content: space-between;"> <span>(Signature)</span> <span>(Date)</span> </div>						Phone Number: 513-487-2006	
						FAX Number:	

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-05				
						<input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number: 000001				
Contract Number EP-C-14-014			Contract Period   07/17/2014   To   02/13/2017 Base                      Option Period Number      2			Title of Work Assignment/SF Site Name Technical Support				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.4					
Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance  From   02/14/2016   To   02/13/2017				
Comments: Increase NTE ceiling from \$400,000 to \$500,000										
<input type="checkbox"/> Superfund                      Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
SFO <input type="checkbox"/> Note: To report additional accounting and appropriations date use EPA Form 1900-69A. (Max 2)										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code
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5										
Authorized Work Assignment Ceiling										
Contract Period:                      Cost/Fee:                      LOE: 07/17/2014   To   02/13/2017										
This Action:  										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:                      Cost/Fee                      LOE:										
Cumulative Approved:                      Cost/Fee                      LOE:										
Work Assignment Manager Name    Stephanie Tanner  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 202-564-2660 FAX Number:			
Project Officer Name    Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:			
Other Agency Official Name    Lisa Mitchell-Flinn  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2852 FAX Number:			
Contracting Official Name    Noelle Mills  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:			



<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-05	
						<input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number: 000001	
Contract Number EP-C-14-014		Contract Period   07/17/2014   To   02/13/2017 Base                      Option Period Number      2		Title of Work Assignment/SF Site Name Technical support for WaterSen			
Contractor EASTERN RESEARCH GROUP, INC.				Specify Section and paragraph of Contract SOW 3.3, 3.4			
Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval				Period of Performance  From   02/14/2016   To   02/13/2017			
Comments: NTE ceiling of \$400,000							
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SFO <input type="checkbox"/> Note: To report additional accounting and appropriations date use EPA Form 1900-69A. (Max 2)							
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)      (Cents)      Site/Project (Max 8)      Cost Org/Code
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Authorized Work Assignment Ceiling							
Contract Period:		Cost/Fee: \$0.00		LOE: 0			
07/17/2014 To 02/13/2017							
This Action:		\$765,445.00		7,423			
Total:		\$765,445.00		7,423			
Work Plan / Cost Estimate Approvals							
Contractor WP Dated: 02/25/2016		Cost/Fee \$765,445.00		LOE: 7,423			
Cumulative Approved:		Cost/Fee \$765,445.00		LOE: 7,423			
Work Assignment Manager Name    Stephanie Tanner						Branch/Mail Code:	
_____ (Signature)    (Date)						Phone Number: 202-564-2660	
						FAX Number:	
Project Officer Name    Robin Danesi						Branch/Mail Code:	
_____ (Signature)    (Date)						Phone Number: 202-564-1846	
						FAX Number:	
Other Agency Official Name    Lisa Mitchell-Flinn						Branch/Mail Code:	
_____ (Signature)    (Date)						Phone Number: 513-487-2852	
						FAX Number:	
Contracting Official Name    Noelle Mills						Branch/Mail Code:	
_____ (Signature)    (Date)						Phone Number: 513-487-2171	
						FAX Number:	

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-08			
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:			
Contract Number EP-C-14-014			Contract Period 07/18/2014 To 02/13/2017 Base                      Option Period Number    2			Title of Work Assignment/SF Site Name NPDES updates			
Contractor EASTERN RESEARCH GROUP, INC.				Specify Section and paragraph of Contract SOW 3.4					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance  From 02/14/2016 To 02/13/2017			
Comments:									
<input type="checkbox"/> Superfund                      Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund									
SFO <input type="checkbox"/> (Max 2)                      Note: To report additional accounting and appropriations date use EPA Form 1900-69A.									
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)  (Cents)	Site/Project (Max 8)	Cost Org/Code
1									
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5									
Authorized Work Assignment Ceiling									
Contract Period:		Cost/Fee:		LOE:					
07/18/2014 To 02/13/2017				0					
This Action:				549					
				549					
Total:									
Work Plan / Cost Estimate Approvals									
Contractor WP Dated:				Cost/Fee		LOE:			
Cumulative Approved:				Cost/Fee		LOE:			
Work Assignment Manager Name    David Hair  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code:			
						Phone Number: 202-564-2287			
						FAX Number:			
Project Officer Name    Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code:			
						Phone Number: 202-564-1846			
						FAX Number:			
Other Agency Official Name  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code:			
						Phone Number:			
						FAX Number:			
Contracting Official Name    Sandra Stargardt-Licis  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code:			
						Phone Number: 513-487-2006			
						FAX Number:			

**PERFORMANCE WORK STATEMENT  
CONTRACT EP-C-14-014  
WORK ASSIGNMENT # 2-8**

**1. ADMINISTRATIVE (PWS Area 3.4)**

**A. TITLE: UPDATE OF NPDES PERMIT APPLICATION FORMS AND PROGRAM**

**B. ESTIMATED PERIOD OF PERFORMANCE:**

From Issuance through February 13, 2017

**C. EPA WORK ASSIGNMENT**

**Work Assignment Contracting Officer Representative (WACOR):**

<b>David Hair</b> Phone: (202) 564-2287 Fax (202) 564-6392 Hair.David@epa.gov	<b><u>USPS Mailing Address</u></b> Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	<b><u>Courier Address</u></b> EPA East Building 1201 Constitution Ave., NW Room 7126A Washington, DC 20004
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**Alternate Work Assignment Contracting Officer Representative (Alt WACOR):**

<b>Sharmin Syed</b> Phone: (202) 564-3052 Fax (202) 564-6392	<b><u>USPS Mailing Address</u></b> Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	<b><u>Courier Address</u></b> EPA East Building 1201 Constitution Ave., NW Room 7135F Washington, DC 20004
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**D. Level of Effort**

EPA estimates 605 hours will be required to support the activities outlined below.

**E. Background/Objective**

The proposed Clean Water Act's (CWA) National Pollution Discharge Elimination System (NPDES) Permit Applications and Program Updates rule seeks to be in compliance with the data and information requirements in the EPA's newly promulgated Electronic Reporting rule (September 2015). This action will ensure that waste water utilities as well as other sources of wastewater will be in compliance with these new data requirements when they issue permits that restrict pollutants into water used by a variety of WaterSense products such as high-efficiency toilets and other water conservation devices. Under the NPDES program, the EPA has developed eight individual permit application forms. The different individual permit application forms correspond to the different categories of dischargers, including

waste water utilities, subject to permitting. Commenters will have the opportunity to comment on 15 provisions in the proposed rulemaking to enhance the NPDES program and one additional area where the rulemaking is simply taking comment. In summary, the NPDES Permit Applications and Program Updates rule will eliminate NPDES application and program inconsistencies, improve permit documentation, transparency and oversight and delete outdated provisions.

## **II. TASK DETAIL:**

The contractor shall perform the following tasks:

### **Task 0 - Work Assignment Management**

The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70). The PQAPP submitted for WA B-01 and B-05 is applicable and acceptable for this work assignment.

The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two (2) hours per month to discuss work assignment issues. The contractor shall provide a status update for tasks via email before each meeting and an update of expenditures. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for approximately three (3) meetings per month.

### **Task 1: Finalize the NPDES application forms to be in compliance with the new Electronic Reporting rule promulgated on September 24, 2015**

#### **A. *Finalize all existing individual NPDES application forms to ensure that they are consistent with the Agency's NPDES Electronic Reporting rule***

1. Based on revised forms recently updated by the contractor, the contractor will finalize any remaining information and data requirements in draft and final application forms and instructions to incorporate revisions to remove and correct the inconsistencies between the individual application forms, instructions, and the permit regulations. This effort will assist water utilities and other facilities in management and handling of program implementation data.

### **Task 2: Supporting the assessment of comments on the proposed Permit Applications and Program Updates rule**

***A. Support EPA in developing materials to support NPDES regulatory revisions associated with the application forms and other program changes***

1. The contractor shall also support EPA by assembling and cataloguing comments made during the comment period for EPA response. Where possible, the contractor shall modify and use a previously developed comment Access data base application. For planning purposes, the contractor should assume that we will receive approximately five hundred to two thousand (500 – 2,000) comments on the rulemaking and use the database to catalogue the comments.

***Deliverables:***

- The contractor shall also assemble and catalogue comments made during the comment period for EPA response.
- A final version of the catalogued comments will be provided to EPA within one (1) week of the close of the comment period.

**III. MISCELLANEOUS**

**A. Software Applications and Accessibility.**

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Files that are available on the website will be delivered to the contractor. Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

**B. Travel.**

Local travel is expected for this work assignment for contractors to attend workgroup meetings at EPA. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place.

**C. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the

Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR.

Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

#### **D. Contractor identification**

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

#### **E. Technical Direction**

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

#### **F. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

#### **G. Reporting Requirements**

Reports shall be submitted in accordance with the reporting requirements of the contract. In addition, the contractor shall maintain telephone contact with the EPA WACOR to advise of progress and problems as needed. All documents shall be delivered in Microsoft software applications in accordance with III. A.

The contractor shall be prepared to submit for inspection copies of all work in progress any time as directed by the WACOR. Wherever practicable, all written materials submitted to EPA must be doubled-sided and on recycled paper. All computer disks submitted to the EPA WACOR shall be scanned for, and identified as free from viruses.

The contractor shall submit drafts and final products in electronic and/or hard copy as well as on the appropriate size disk in a format compatible with Office of Wastewater Management hardware.

## **VII. QUALITY ASSURANCE SURVEILLANCE PLAN**

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment.

## **VIII. RELEASE OF DATA AND INFORMATION**

All information collected and developed under this Agreement is the property of the U.S. EPA and may not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-08			
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:			
Contract Number EP-C-14-014		Contract Period   07/18/2014   To   02/13/2017 Base                      Option Period Number    2		Title of Work Assignment/SF Site Name NPDES support					
Contractor EASTERN RESEARCH GROUP, INC.				Specify Section and paragraph of Contract SOW 3.4					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval						Period of Performance  From   02/14/2016   To   02/13/2017			
Comments:									
<input type="checkbox"/> Superfund                      Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund									
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.									
SFO <input type="checkbox"/> (Max 2)									
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)  (Cents)	Site/Project (Max 8)	Cost Org/Code
1									
2									
3									
4									
5									
Authorized Work Assignment Ceiling									
Contract Period:		Cost/Fee: \$0.00		LOE: 0					
07/18/2014 To 02/13/2017									
This Action:		\$39,956.00		605					
Total:		\$39,956.00		605					
Work Plan / Cost Estimate Approvals									
Contractor WP Dated: 02/29/2016		Cost/Fee \$39,956.00		LOE: 605					
Cumulative Approved:		Cost/Fee \$39,956.00		LOE: 605					
Work Assignment Manager Name   David Hair  <div style="display: flex; justify-content: space-between; border-top: 1px solid black; margin-top: 10px;"> <span>(Signature)</span> <span>(Date)</span> </div>						Branch/Mail Code:			
						Phone Number: 202-564-2287			
						FAX Number:			
Project Officer Name   Robin Danesi  <div style="display: flex; justify-content: space-between; border-top: 1px solid black; margin-top: 10px;"> <span>(Signature)</span> <span>(Date)</span> </div>						Branch/Mail Code:			
						Phone Number: 202-564-1846			
						FAX Number:			
Other Agency Official Name   Lisa Mitchell-Flinn  <div style="display: flex; justify-content: space-between; border-top: 1px solid black; margin-top: 10px;"> <span>(Signature)</span> <span>(Date)</span> </div>						Branch/Mail Code:			
						Phone Number: 513-487-2852			
						FAX Number:			
Contracting Official Name   Sandra Stargardt-Licis  <div style="display: flex; justify-content: space-between; border-top: 1px solid black; margin-top: 10px;"> <span>(Signature)</span> <span>(Date)</span> </div>						Branch/Mail Code:			
						Phone Number: 513-487-2006			
						FAX Number:			





United States Environmental Protection Agency  
Washington, DC 20460

### Work Assignment

Work Assignment Number

2-09

☐ Other ☐ Amendment Number:

Contract Number

EF-C-14-014

Contract Period 07/18/2014 To 02/13/2017

Base

Option Period Number 0

Title of Work Assignment/SF Site Name

WIFIA Eng Prog Support

Contractor

EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW

3.3

Purpose:



Work Assignment



Work Assignment Close-Out



Work Assignment Amendment



Incremental Funding



Work Plan Approval

Period of Performance

From 08/17/2016 To 02/13/2017

Comments:



Superfund

#### Accounting and Appropriations Data



Non-Superfund

SFO  
(Max 2)



Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code
1										
2										
3										
4										
5										

#### Authorized Work Assignment Ceiling

Contract Period:

Cost/Fee:

LOE:

07/18/2014 To 02/13/2017

This Action

Total:

#### Work Plan / Cost Estimate Approvals

Contractor WP Dated

Cost/Fee

LOE:

Cumulative Approved:

Cost/Fee

LOE:

Work Assignment Manager Name: Dawsha Chandy

Branch/Mail Code:

Phone Number: 202-566-2165

FAX Number:

(Signature)

(Date)

Project Officer Name: Robin Danesi

Branch/Mail Code:

Phone Number: 202-564-1946

FAX Number:

(Signature)

(Date)

Other Agency Official Name: Lisa Mitchell-Pinn

Branch/Mail Code:

Phone Number: 513-487-2852

FAX Number:

(Signature)

(Date)

Contracting Official Name: Noelle Mills

Branch/Mail Code:

Phone Number: 513-487-2171

FAX Number:

(Signature)

(Date)

## PERFORMANCE WORK STATEMENT

Contract # EP-C-14-014

Work Assignment No. 2-09

### I. ADMINISTRATIVE

- a. Title: WIFIA Engineering Program Support
- b. Period of Performance: Issuance to 2/13/17
- c. Work Assignment Contracting Officer Representative (WACOR)

<b>Work Assignment Contracting Officer Representative Danusha Chandy 1200 Pennsylvania Ave, NW MC 4201-T Washington, DC 20460 202-566-2165 Phone 202-565-2587 Fax</b>	<b>Alternate WACOR Karen Fligger 1200 Pennsylvania Ave, NW MC 4201-T Washington, DC 20460 202-564-2992 Phone 202-565-2587 Fax</b>
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#### d. Quality Assurance

The requirements do not include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is not required.

#### e. Background

EPA administers the WIFIA program, which provides secured (direct) loans and loan guarantees for water and wastewater infrastructure projects. The WIFIA statute was enacted as Title V of the Water Resources Reform and Development Act (WRRDA) of 2014 (33 U.S.C. 3901-3914). Through WIFIA, EPA can loan up to 49 percent of the cost of water and wastewater infrastructure projects. The program is designed to provide loans for the development of water and wastewater infrastructure. Additional information about the WIFIA program may be found on the Internet: <http://www.epa.gov/wifia>.

EPA is designing a two-phased application process. Interested parties wishing to apply for WIFIA credit assistance must first complete and submit a letter of interest to be considered for federal credit assistance. EPA will evaluate letters of interest against program objectives and for creditworthiness and invite selected interested parties to submit applications. The purpose of the application is to ensure that the applicant and project(s) are creditworthy, to calculate the amount of budget authority that will be needed to fund the project(s), and to examine the technical feasibility of the project(s). The application process is structured in a similar way to the letter of interest, but requires submission of more detailed project material and supporting documents. The draft application materials are

available at <https://www.regulations.gov/#!documentDetail;D=EPA-HQ-OW-2016-0178-0001>.

While the WIFIA program is the first direct loan program for water and wastewater infrastructure to be administered by EPA, EPA has been partnering with the states to administer the Clean Water State Revolving Fund (CWSRF), the Drinking Water State Revolving Fund (DWSRF), and the grant programs. The CWSRF is a federal-state partnership that provides communities a permanent, independent source of low-cost financing for a wide range of water quality infrastructure projects. The DWSRF is a federal-state partnership to help ensure safe drinking water. In addition, EPA provides assistance to states (including territories and the District of Columbia), interstate agencies, and eligible tribes to establish and implement ongoing water pollution control programs through the grants programs. By studying the implementation of these existing programs, the WIFIA program can begin to identify best practices to implement for the WIFIA project review process.

## **II. OBJECTIVE**

The objective of this work assignment is to obtain technical support in the development of the due diligence project review processes in the WIFIA program. EPA requires an in-depth understanding of the variety of design and procurement requirements currently in place in order to make decisions about the WIFIA engineering review process. This work assignment will provide research on design standards, development of project review guidelines and checklists, and assistance with technical outreach to stakeholders.

For each of the following tasks, EPA will make results of previous research and program development materials available as necessary. For all tasks, the contractor shall provide all source files and content to EPA with final deliverables. For each of the following tasks, the contractor shall be responsible for coordinating certain activities with other EPA offices or other organizations outside of EPA. When the contractor is responsible for coordinating activities with EPA or other outside organizations, the contractor should be certain to communicate that they are working as an EPA Contractor. The contractor must be familiar with EPA's Office of Public Affairs guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables should comply with those requirements.

## **III. TASK DETAILS**

The contractor shall perform the following tasks:

### **Task 1 - Work Plan and Funds Tracking and Management**

*Task 1.1 Work Plan* – The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each

task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. The contractor shall meet with the WACOR to review the work plan. Based on feedback provided by the WACOR at the meeting and written comments, the contractor shall update the work plan.

*Task 1.2 Funds Tracking and Management* – This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70). The budget for this work assignment shall be tracked at the task level. The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two hours per month to discuss work assignment planning issues. The contractor shall also maintain a milestone chart or other tracking system for projects underway as part of this WA.

## **Task 2 – Design Standards Screening and Research**

Under this task the contractor shall conduct research on water and wastewater infrastructure design standards including industry standards and state standards and/or requirements. This research will be the basis for determining how to develop program guidelines and checklists in Task 4. Under this task area the contractor shall complete the preliminary screenings and detailed assessments described below.

*Task 2.1 Standards Screening*– The contractor shall develop a Water Infrastructure Engineering Design Standards spreadsheet. The spreadsheet will be used by the WIFIA program to prioritize state and industry design and project review standards for detailed review and possible guideline development. The spreadsheet should highlight the differences in design standards and requirements between the fifty (50) states and whether each state has a construction permit and/or design approval process for water and wastewater infrastructure projects. The contractor can expect to submit a template of the spreadsheet to the WACOR for review and comment prior to beginning the data collection.

A meeting will be scheduled after the contractor has partially completed the spreadsheet with three (3) to five (5) states and industry standards to check in on progress and make any additional adjustments necessary.

Deliverables will be provided in accordance with Deliverable Schedule in Section IV.

*Task 2.2 Standards Research* – Based on the information gathered in Task 2.1, a meeting will be scheduled to discuss which industry and state design standards to be reviewed in detail for incorporation into the WIFIA engineering review process. The contractor shall conduct a detailed review of the selected industry and design standards and identify which requirements should be considered for

incorporation in to the WIFIA engineering review process. The contractor can expect to conduct detailed research on five (5) to ten (10) state or industry standards. The contractor shall submit such documentation in the form of a report, with comparison tables summarizing the detailed standards, for review by the WACOR. Based on feedback provided by the WACOR and written comments, the contractor shall update the report.

The contractor can expect to attend and participate in 4-5 meetings taking place locally or via conference call or webinar. Deliverables will be provided in accordance with Deliverable Schedule in Section IV.

### **Task 3 –Project Review Best Practices**

EPA has begun compiling research on DWSRF, CWSRF, and EPA grant programs and shall make this research available to the contractor via electronic files. Based on technical direction from the WACOR, the contractor shall conduct web based research on an additional three (3) to five (5) DWSRF and three (3) to five (5) CWSRF programs on their project submittal requirements and project review processes. The contractor shall conduct similar web based research on up to two (2) federal credit subsidy programs (i.e Transportation Infrastructure Financing Innovation Act, the Department of Energy's Loan Guarantee Program, etc.).

The contractor shall summarize the findings of the web based research and EPA supplied research in the form of a memorandum with actual DWSRF, CWSRF, and credit subsidy program documents, such as application materials, review checklists, and guidance documents included in the appendices. The contractor should highlight best practices and methodologies in the memorandum.

The contractor can expect to attend and participate in five (5) to seven (7) meetings taking place locally or via conference call or webinar. Deliverables will be provided in accordance with Deliverable Schedule in Section IV.

### **Task 4 –Project Review Documents**

The WIFIA program consists of a two-phased application process. The first phase is the Letter of Interest submission and the second phase is the Application submission. EPA will conduct engineering reviews at each phase of the application process. During the Letter of Interest phase, it is expected that the engineering review will consist of a preliminary analysis of project suitability for the WIFIA program. During the Application phase, it is expected that the engineering analysis will consist of a more detailed due diligence of the project than at the Letter of Interest phase.

*Task 4.1 Letter of Interest Review Documents* – Based on findings of Tasks 2 and 3, the contractor shall develop project review documents to be incorporated into the letter of interest review for the WIFIA program. Project review documents

may include, but are not limited to, design review checklists, federal procurement requirements (i.e. Davis-Bacon and competitive bidding) checklists, cross cutter checklists, review process flowcharts, and a design standards manual with links to applicable state and industry standards. The contractor shall prepare a draft list of review documents to be developed to create a streamlined engineering review process for letters of interest for the WIFIA program. The draft list shall contain preliminary sections for each review document. The contractor can expect to develop ten (10) to fifteen (15) checklists and a design standards manual as part of this task.

Final review documents should be provided in electronic format, compatible with the MS Office Suite, and in fillable PDF format. Prior to the development of the final draft of each review document, the contractor shall conduct a mock letter of interest review workshop to fine tune the review documents.

The contractor can expect to attend three (3) to five (5) meetings taking place locally or via conference call or webinar. Deliverables will be provided in accordance with Deliverable Schedule in Section IV.

*Task 4.2 Application Review Documents* - Building upon the results of Tasks 2, 3, and 4.1 and technical direction from the WACOR, the contractor shall develop project review documents to be incorporated into the application review for the WIFIA program. Project review documents may include, but are not limited to, design review checklists, federal procurement requirements (i.e. Davis-Bacon and competitive bidding) checklists, cross cutter checklists, and review process flowcharts. The contractor shall prepare a draft list of review documents to be developed to create a streamlined engineering review process for the WIFIA application. The draft list shall contain preliminary sections for each review document. The contractor can expect to develop fifteen (15) to twenty (20) checklists as part of this task.

Final review documents should be provided in electronic format, compatible with the MS Office Suite, and in fillable PDF format. Prior to the development of the final draft of each review document, the contractor shall conduct a mock application review workshop to fine tune the review documents.

The contractor can expect to attend three (3) to five (5) meetings taking place locally or via conference call or webinar. Deliverables will be provided in accordance with Deliverable Schedule in Section IV.

#### **Task 5 - Technical Support and Outreach**

The objective of this task is to support the WIFIA program. Items identified here are potential areas for support; actual activities under this task will be based on the needs of the WIFIA program as they develop.

*Task 5.1 Marketing and technical outreach* – the contractor shall develop outreach strategy and materials for technical professional and trade audiences such as architects, engineers, developers, or utility managers. The contractor shall develop outreach materials and activities that correctly reflect the technical and due diligence aspects of the program and meets the needs of the chosen target audience. This can include media information requests, web content, webinar content and support, presentations and conference papers. The contractor can expect up to five (5) requests for support throughout the year.

*Task 5.2 Miscellaneous technical support* – From time to time questions from stakeholders arise about WIFIA program engineering review process. The contractor can expect up to ten (10) requests for support to answer questions throughout the period of performance. The contractor and the WACOR shall agree on an appropriate response time based on the complexity of the support required.

#### **IV. DELIVERABLE SCHEDULE (by tasks/subtask and due date)**

All activities shall begin based on WACOR direction unless otherwise noted. Due dates for draft documents are identified in the tables below. The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than ten (10) business days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

##### **Task 1 – Work Plan, Funds Tracking and Work Assignment Management**

<b>Subtask</b>	<b>Deliverable</b>	<b>Draft Due Date</b>
1.1	Work Plan	Per contract requirements.
1.2	Funds Tracking and WA Management	Monthly per contract requirements.

##### **Task 2 - Design Standards Screening and Research**

<b>Subtask</b>	<b>Deliverable</b>	<b>Due Date</b>
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2.1	Water Infrastructure Engineering Design Standards Completed Spreadsheet	Within 30 business days of WACOR direction
2.2	Standards Research Report	Within 30 business days of WACOR direction

### **Task 3 - Project Review Best Practices**

<b>Subtask</b>	<b>Deliverable</b>	<b>Due Date</b>
3.0	Project Review Research Memorandum	Within 20 business days of WACOR direction

### **Task 4 – Project Review Documents**

<b>Subtask</b>	<b>Deliverable</b>	<b>Due Date</b>
4.1	List of Letter of Interest Review Documents to be Prepared	Within 10 business days of WACOR direction
4.1	Letter of Interest Review Documents	Within 30 business days of WACOR direction
4.2	List of WIFIA Application Review Documents to be Prepared	Within 10 business days of WACOR direction
4.2	WIFIA Application Review Documents	Within 20 business days of WACOR direction

### **Task 5 – Technical Support and Outreach**

<b>Subtask</b>	<b>Deliverable</b>	<b>Due Date</b>
5.1	Marketing and outreach materials	As directed by the WACOR
5.2	Miscellaneous technical support	As directed by the WACOR

## **V. MISCELLANEOUS**

### **A. Software Applications and Accessibility**

Files delivered to the Government shall be Microsoft Office 2013 or higher. All software and electronic information technology shall conform to the requirements



relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word,
- Preferred presentation format: Power Point
- Preferred graphics format: Each graphic is an individual JPEG or GIF file
- Preferred portable format: Adobe Acrobat, Version X
- Preferred tracking format: MS project or excel

**B. Travel.** Travel is not expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. The WACOR will provide at least a two week notice of any non-local travel.

**C. Release of Data and Information.**

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the Contracting Officer. Information from this task shall be included in the program database (Salesforce), as appropriate. Updates to the database shall include communications with Stakeholders such as e-mails and meeting summaries.

**D. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

**E. Contractor identification**

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The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

#### **G. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

#### **VI. QUALITY ASSURANCE SURVEILLANCE PLAN**

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment. The requirements do not include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is not required.

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-09				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-C-14-014			Contract Period   07/18/2014   To   02/13/2017 Base                      Option Period Number      2			Title of Work Assignment/SF Site Name WIFIA Eng Prog Support				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.3					
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval						Period of Performance  From   08/17/2016   To   02/13/2017				
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund           Accounting and Appropriations Data           <input checked="" type="checkbox"/> Non-Superfund         </div>										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO <input type="checkbox"/> (Max 2)										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code
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Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee: \$0.00		LOE: 0						
07/18/2014 To 02/13/2017										
This Action:		\$249,890.00		2,478						
Total:		\$249,890.00		2,478						
Work Plan / Cost Estimate Approvals										
Contractor WP Dated: 08/31/2016		Cost/Fee \$249,890.00		LOE: 2,478						
Cumulative Approved:		Cost/Fee \$249,890.00		LOE: 2,478						
Work Assignment Manager Name   Danusha Chandy  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 202-566-2165 FAX Number:				
Project Officer Name   Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:				
Other Agency Official Name   Lisa Mitchell-Flinn  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2852 FAX Number:				
Contracting Official Name   Noelle Mills  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:				

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>		Work Assignment Number 2-10																																																																		
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**PERFORMANCE WORK STATEMENT  
CONTRACT EP-C-14-014  
WORK ASSIGNMENT # 2-10**

**1. ADMINISTRATIVE (PWS Area 3.4)**

**A. TITLE: Long-term Stormwater and Wastewater Planning Technical Assistance**

**B. ESTIMATED PERIOD OF PERFORMANCE:**

From Issuance through February 13, 2017

**C. EPA WORK ASSIGNMENT**

**Work Assignment Contracting Officer Representatives (WACORs):**

<b>Rachel Herbert</b> Phone: (202) 564-2649 Fax (202) 564-6392 <a href="mailto:Herbert.Rachel@epa.gov">Herbert.Rachel@epa.gov</a>  Issuance – 1/25/17 (Primary WACOR) 5/26/17 – 6/30/17 (Primary WACOR)	<b><u>USPS Mailing Address</u></b> Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	<b><u>Courier Address</u></b> EPA East Building 1201 Constitution Ave., NW Room 7324E Washington, DC 20004
<b>Lisa Biddle</b> Phone: (202) 566-0350 Fax (202) 564-6392  2/1/17 – 5/25/17 (Alt. WACOR)	<b><u>USPS Mailing Address</u></b> Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	<b><u>Courier Address</u></b> EPA East Building 1201 Constitution Ave., NW Room 7324P Washington, DC 20004
<b>Jamie Piziali</b> Phone: (202) 564-1709 Fax (202) 564-6392  Issuance – 1/25/17 (Alt. WACOR) 1/26/17 -5/25/17 (Primary WACOR) 5/26/17 – 6/30/17 (Alt. WACOR)	<b><u>USPS Mailing Address</u></b> Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	<b><u>Courier Address</u></b> EPA East Building 1201 Constitution Ave., NW Room 7324Q Washington, DC 20004

**D. Level of Effort**

EPA estimates approximately 1,746 hours will be required to support the activities outlined below.

**E. Background/Objective**

Urban stormwater continues to be a growing source of water pollution, carrying pollutants and bacteria that can impact public health and causing extensive flooding, property damage

and habitat destruction. It also can overwhelm wastewater systems and overflow sewers, impeding communities' efforts to provide the reliable services that the public expects from their water infrastructure. Despite these challenges, municipalities are working hard to communicate the value of their water resources and their efforts to protect them. They are looking for better ways to make smart infrastructure investments and improve community resiliency through sustainable, multi-benefit practices like green infrastructure.

EPA is looking at ways to help communities make strategic, long-term investments in their wastewater and/or stormwater systems that yield strong environmental results. It is an important step towards helping communities include broader objectives, planning schedules, and capital improvements in their stormwater management programs.

EPA plans to set forth a cohesive narrative for good stormwater management that conveys the elements EPA would look for in a community's long-term plan for stormwater. Communities are looking to manage their water systems more holistically, which will require appropriately sequenced and affordable financial investments that will need to be implemented on a time horizon sufficient to allow for cost efficiencies with other municipal programs. These stormwater concepts can be used as part of integrated planning approaches or separately. The scope of an integrated plan can cover separate stormwater and wastewater systems or any combination of systems depending on the community's needs and objectives.

EPA will complement these efforts by providing coordinated technical assistance to help develop community-based long-term stormwater plans and/or integrated plans that will serve as national models. We will leverage the lessons learned from these efforts to share helpful information related to lowering barriers to long-term water infrastructure planning, making progress on human health and water quality objectives, and decreasing the costs of both stormwater and wastewater management.

This work assignment will include supporting technical assistance projects with up to four communities. The technical assistance will include meetings with communities, permitting authorities, and other federal, state, and local stakeholders. Support will be provided to communities as they develop draft long-term stormwater plans and engage in analyses and evaluations necessary to assess long-term stormwater and wastewater planning options in their communities. Ultimately a public outreach report will be developed for each technical assistance project that describes the project and highlights how the example, tool, or process can be applied to or implemented in the selected community as well as other communities.

As part of this technical assistance, communities will be "beta testing" the new stormwater planning concepts and a toolkit (to be shared by EPA), so support may also be needed in compiling comments from the beta testing and identifying opportunities to improve the tool. In addition, references and resource gaps/needs may be identified during the beta testing and the contractor may be asked to research possible tools and references that could be added to the toolkit in the future.

## **II. TASK DETAIL:**

The contractor shall perform the following tasks:

### **Task 0 - Work Assignment Management**

The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70).

The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two (2) hours per month to discuss work assignment issues. The contractor shall provide a status update for tasks via email before each meeting and an update of expenditures. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for approximately three (3) meetings per month.

### **Task 1 – Technical Assistance Support**

Under this Task the contractor shall provide technical support based on stormwater planning concepts and the Integrated Planning Framework for four community partners. EPA will work with each recipient community to define a technical assistance project that will a) serve EPA in developing practical examples, knowledge and resources on integrated planning and long-term stormwater planning that can be transferred to other communities and to a national audience, and b) advance the implementation of stormwater and/or wastewater planning in the selected community. The technical assistance projects will include the development of certain elements of an integrated plan and/or long-term stormwater plan identified in the individual project workplans approved by the EPA WACOR.

The EPA WACOR will provide technical direction whenever necessary to the contractor to indicate the scope and schedule of each technical assistance project. Anticipated tasks may include:

#### ***Task 1A – Meeting Support***

The contractor shall participate in planning meetings with the communities and related federal, state, and/or local stakeholders. There will be regular conference calls with stakeholders. There may also be travel necessary to the communities to engage in meetings and help facilitate stakeholder engagement in the plan development process. The contractor can assume four non-local trips will be required during this period of performance to destinations that could include four of the following states (Iowa, New Jersey, New Mexico, Mississippi, New Hampshire, Wisconsin, and Oregon).

**Deliverables:** The contractor shall prepare meeting agendas and submit for EPA review and approval 2 weeks prior to the meeting and deliver draft meeting notes as directed by

the EPA WACOR for calls and meetings held with technical assistance communities and/or other stakeholder groups. Draft notes shall be delivered within five (5) business days after the meeting. Revised notes shall be delivered within five (5) business days of receiving comments from the EPA WACOR.

Assumptions: For planning purposes, the contractor can assume that during this period of performance there will be one meeting per week that requires the contractor to write meeting summary notes.

### ***Task 1B – Technical Analyses***

The contractor shall support technical analyses of stormwater and/or wastewater solutions if the community identifies the need for this support during the project.

Deliverables: During the long-term stormwater or integrated plan development process, EPA may identify analyses that the contractor shall support for the technical assistance community. Analyses could be related to:

- identifying goals of long-term stormwater planning efforts;
- describing any applicable water quality, human health and regulatory issues;
- describing existing stormwater and/or wastewater systems and their performance;
- planning to encourage the active participation of the community in development and implementation of a long-term stormwater plan;
- examining alternatives;
- examining investments and implementation schedules;
- measuring success; and
- improving the long-term stormwater plan.

Specific analyses could include analyzing stormwater and/or wastewater challenges and suggesting design alternatives; evaluating stormwater design strategies; developing planning-level designs; estimating costs to calculate savings; optimizing green infrastructure; analyzing total maximum daily loads and waste load allocations in relation to stormwater and/or wastewater challenges; reviewing permit requirements; calculating stormwater quantity and/or quality benefits from various design alternatives. Technical analysis deliverables and deadlines will be established based on the specifics of each task and will not be required any sooner than five (5) business days after assignment.

Assumptions: For planning purposes, the contractor can assume that during this period of performance there will be 16 technical analyses tasks.

### ***Task 1C – Public Outreach Reports.***

The contractor shall develop a public outreach report or document for EPA for each technical assistance project that describes the project and highlights how the example, tool, or process can be applied to or implemented in the selected community as well as other communities.

Deliverables: The contractor shall deliver a draft report on each technical assistance project to EPA WACOR for review and comment within four (4) weeks of finishing the project. The contractor shall deliver a final report (or another draft if requested) on each



technical assistance project within three (3) weeks of receiving comments on the draft integrated project report from EPA WACOR. All final reports shall be 508 compliant. Assumptions: For planning purposes, the contractor can assume that one (1) public outreach report will be required.

#### ***Task 1D – Quick turn-around research and technical support activities***

The contractor may be asked to support quick turn-around tasks from time to time to assist EPA in responding to inquiries from management, technical assistance communities, and others.

Deliverables: Deliverable format will be specific to the task and will be discussed when each task is assigned. Example deliverables may include: an email summarizing research findings on a certain topic, fact sheets, data tables summarizing information that has been collected as part of the technical assistance work, or that is already available to EPA through other means, PowerPoint slides and/or graphics for meetings and presentations, and summaries of feedback from communities on the toolkit. Deliverables and deadlines will be established based on the specifics of each task and will not be required any sooner than two (2) business days after assignment.

Assumptions: For planning purposes, the contractor can assume that during this period of performance there will be 25 quick turn-around tasks.

#### ***Task 1E – Communications Support***

The contractor shall provide support in developing communications materials such as graphics for our website, social media graphics, logo work, infographics, or fact sheets.

The contractor shall update the website within 1 week of receiving technical direction. The contractor shall ensure they have final EPA approval before making final 508 compliant version of graphics/documents. If EPA requires additional edits to this final version, the contractor will have 2 business days to make adjustments.

Deliverables: Deliverable format will be specific to the task and will be discussed when each task is assigned, but large full-sized files or images will be requested and any created graphics should be in vector-based file formats unless the WAM agrees to another format. Deliverables and deadlines will be established based on the specifics of each task and will not be required any sooner than three (3) business days after assignment. Example deliverables may include: A draft of fact Sheets/infographics/logos/social media graphics. If EPA requests additional drafts, the Contractor shall deliver within three (3) business days. After EPA sends final comments the Contractor shall deliver a final within 1 week.

Assumptions: For planning purposes, the contractor can assume that during this period of performance there will be 5 requests.

#### ***Task 2 – Quality Assurance Project Plan***

EPA requires that all environmental data used in decision making be supported by an approved QAPP. The contractor shall prepare a QAPP or update an approved QAPP as necessary to address any changes or additional tasks within the Work Assignment that are subject to a QAPP as determined by EPA.

Data Quality Requirements: The contractor shall develop data quality requirements (DQRs) and methods for achieving them for the data elements in their DELIVERABLES. Descriptions of data quality requirements (DQRs) and methods for achieving these DQRs developed under this work assignment shall be added to the Office of Water DQR library for use in developing QAPPs for future projects. Such descriptions of DQRs and methods for achieving them shall be the property of EPA.

Deliverables: A QAPP that describes the contractor's plan for:

- Identifying the data elements for any data-related activities, and for each of these data elements identifying either (i) the data quality requirements (DQRs) or (ii) the policy that states DQRs are not required,
- Describing their methods for achieving the DQRs, and
- Assuring any environmental data contained in the deliverables shall (i) be of sufficient quality for their intended primary uses and (ii) have adequate quality documentation for determining whether these data are of sufficient quality for future secondary uses.
- Quarterly progress reports that (a) describe the contractor's progress on implementing the QAPP and resolving old data quality issues, (b) describe any new issues, and (c) provide the LOE and cost expenditures for developing the QAPP.

An approved QAPP is required before starting work under Tasks 1B through 1E.

QAPP Submittal: A QAPP should be submitted within 15 days of work plan approval.

### **III. MISCELLANEOUS**

#### **A. Software Applications and Accessibility.**

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Files that are available on the website will be delivered to the contractor. Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual graphic file (.bmp, .gif, .jpeg, .tif, .png files preferred – Contractor shall deliver full-sized images or vector-based graphics unless otherwise requested.)
- Preferred portable format: Adobe Acrobat, Version 6.0

#### **B. Travel.**

Local travel is expected for this work assignment for contractors to attend meetings at EPA. For estimating costs, the contractor can assume one trip to EPA may be required per month. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place.

Non-local travel is also expected for this work assignment for contractors to attend meetings with the technical assistance communities. For the purposes of estimating costs, the contractor can assume four non-local trips will be required during this period of performance to destinations that could include four of the following states (Iowa, New Jersey, New Mexico, Mississippi, New Hampshire, and Oregon).

### **C. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR.

Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

### **D. Contractor identification**

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

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The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction shall be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum shall be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

## **F. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

## **G. Reporting Requirements**

Reports shall be submitted in accordance with the reporting requirements of the contract. In addition, the contractor shall maintain telephone contact with the EPA WACOR to advise of progress and problems as needed. All documents shall be delivered in Microsoft software applications in accordance with Section III. Miscellaneous. Subsection A of this PWS.

The contractor shall be prepared to submit for inspection copies of all work in progress any time as directed by the WACOR. Wherever practicable, all written materials submitted to EPA must be doubled-sided and on recycled paper. All computer disks submitted to the EPA WACOR shall be scanned for, and identified as free from viruses.

The contractor shall submit drafts and final products in electronic and/or hard copy as well as on the appropriate size disk in a format compatible with Office of Wastewater Management hardware.

The Contractor shall provide the WACOR with a breakout of dollars spent on separate community projects on at least a quarterly basis and when requested by WACOR.

## **H. Guidance Regarding Writing for EPA**

EPA products are to conform to EPA standards. Please reference EPA Stylebook <http://www2.epa.gov/stylebook>. Note also that EPA utilizes AP Style first (<http://www.apstylebook.com>) and U.S. Government Printing Office Style Manual second (<http://www.gpo.gov/fdsys/search/pagedetails.action?granuleId=&packageId=GPO-STYLEMANUAL-2008&fromBrowse=true>)

## **VII. QUALITY ASSURANCE SURVEILLANCE PLAN**

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment.

## **VIII. RELEASE OF DATA AND INFORMATION**

All information collected and developed under this Agreement is the property of the U.S. EPA

and may not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;"> <h1 style="margin: 0;">EPA</h1> </div> <div style="text-align: center;"> <p>United States Environmental Protection Agency Washington, DC 20460</p> <h2 style="margin: 0;">Work Assignment</h2> </div> </div>		Work Assignment Number 2-10								
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Purpose: <div style="display: flex; justify-content: space-between;"> <div> <input checked="" type="checkbox"/> Work Assignment  <input type="checkbox"/> Work Assignment Amendment  <input checked="" type="checkbox"/> Work Plan Approval         </div> <div> <input type="checkbox"/> Work Assignment Close-Out  <input type="checkbox"/> Incremental Funding         </div> </div>		Period of Performance  From 10/11/2016 To 02/13/2017								
Comments:										
<div style="display: flex; justify-content: space-between; align-items: center;"> <input type="checkbox"/> Superfund         <div style="flex-grow: 1;">Accounting and Appropriations Data</div> <input checked="" type="checkbox"/> Non-Superfund       </div>										
<div style="display: flex; justify-content: space-between;"> <div>           SFO (Max 2)           <div style="border: 1px solid black; width: 30px; height: 20px; display: flex; align-items: center; justify-content: center;">             SFO           </div> </div> <div>           Note: To report additional accounting and appropriations date use EPA Form 1900-69A.         </div> </div>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:		\$0.00		LOE:		0		
07/18/2014 To 02/13/2017										
This Action:				\$168,282.00		1,746				
Total:				\$168,282.00		1,746				
Work Plan / Cost Estimate Approvals										
Contractor WP Dated: 12/07/2016				Cost/Fee \$168,282.00		LOE: 1,746				
Cumulative Approved:				Cost/Fee \$168,282.00		LOE: 1,746				
Work Assignment Manager Name Rachel Herbert  <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">(Signature)</div> </div> <div style="width: 45%;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">(Date)</div> </div> </div>						Branch/Mail Code: Phone Number: 202-564-2649 FAX Number:				
Project Officer Name Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">(Signature)</div> </div> <div style="width: 45%;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">(Date)</div> </div> </div>						Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:				
Other Agency Official Name  <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">(Signature)</div> </div> <div style="width: 45%;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">(Date)</div> </div> </div>						Branch/Mail Code: Phone Number: FAX Number:				
Contracting Official Name Noelle Mills  <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">(Signature)</div> </div> <div style="width: 45%;"> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="text-align: center; font-size: small;">(Date)</div> </div> </div>						Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:				

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-10				
						<input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number: 000001				
Contract Number EP-C-14-014			Contract Period   07/17/2014   To   02/13/2017 Base                      Option Period Number      2			Title of Work Assignment/SF Site Name Stormwater Support				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW					
Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval					Period of Performance  From   10/11/2016   To   02/13/2017					
Comments: The purpose of this amendment is to revise the PWS with no increase to the LOE.										
<input type="checkbox"/> Superfund    Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO <input type="checkbox"/> (Max 2)										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code
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2										
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Contract Period:		Cost/Fee:		LOE: 1,746						
07/17/2014 To 02/13/2017										
This Action:				0						
Total:				1,746						
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee			LOE:			
Cumulative Approved:				Cost/Fee			LOE:			
Work Assignment Manager Name   Rachel Herbert  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 202-564-2649 FAX Number:			
Project Officer Name   Robin Danesi  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:			
Other Agency Official Name   Lisa Mitchell-Flinn  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2852 FAX Number:			
Contracting Official Name   Kathleen Rechenberg  <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:			

**PERFORMANCE WORK STATEMENT  
CONTRACT EP-C-14-014  
WORK ASSIGNMENT # 2-10**

**1. ADMINISTRATIVE (PWS Area 3.4)**

**A. TITLE: Long-term Stormwater and Wastewater Planning Technical Assistance**

**B. ESTIMATED PERIOD OF PERFORMANCE:**

From Issuance through February 13, 2017

**C. EPA WORK ASSIGNMENT**

**Work Assignment Contracting Officer Representatives (WACORs):**

<b>Rachel Herbert</b> Phone: (202) 564-2649 Fax (202) 564-6392 <a href="mailto:Herbert.Rachel@epa.gov">Herbert.Rachel@epa.gov</a>  Issuance – 1/25/17 (Primary WACOR) 5/26/17 – 6/30/17 (Primary WACOR)	<b><u>USPS Mailing Address</u></b> Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	<b><u>Courier Address</u></b> EPA East Building 1201 Constitution Ave., NW Room 7324E Washington, DC 20004
<b>Lisa Biddle</b> Phone: (202) 566-0350 Fax (202) 564-6392  2/1/17 – 5/25/17 (Alt. WACOR)	<b><u>USPS Mailing Address</u></b> Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	<b><u>Courier Address</u></b> EPA East Building 1201 Constitution Ave., NW Room 7324P Washington, DC 20004
<b>Jamie Piziali</b> Phone: (202) 564-1709 Fax (202) 564-6392  Issuance – 1/25/17 (Alt. WACOR) 1/26/17 -5/25/17 (Primary WACOR) 5/26/17 – 6/30/17 (Alt. WACOR)	<b><u>USPS Mailing Address</u></b> Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	<b><u>Courier Address</u></b> EPA East Building 1201 Constitution Ave., NW Room 7324Q Washington, DC 20004

**D. Level of Effort**

EPA estimates approximately 1,746 hours will be required to support the activities outlined below.

**E. Background/Objective**

Urban stormwater continues to be a growing source of water pollution, carrying pollutants and bacteria that can impact public health and causing extensive flooding, property damage



and habitat destruction. It also can overwhelm wastewater systems and overflow sewers, impeding communities' efforts to provide the reliable services that the public expects from their water infrastructure. Despite these challenges, municipalities are working hard to communicate the value of their water resources and their efforts to protect them. They are looking for better ways to make smart infrastructure investments and improve community resiliency through sustainable, multi-benefit practices like green infrastructure.

EPA is looking at ways to help communities make strategic, long-term investments in their wastewater and/or stormwater systems that yield strong environmental results. It is an important step towards helping communities include broader objectives, planning schedules, and capital improvements in their stormwater management programs.

EPA plans to set forth a cohesive narrative for good stormwater management that conveys the elements EPA would look for in a community's long-term plan for stormwater. Communities are looking to manage their water systems more holistically, which will require appropriately sequenced and affordable financial investments that will need to be implemented on a time horizon sufficient to allow for cost efficiencies with other municipal programs. These stormwater concepts can be used as part of integrated planning approaches or separately. The scope of an integrated plan can cover separate stormwater and wastewater systems or any combination of systems depending on the community's needs and objectives.

EPA will complement these efforts by providing coordinated technical assistance to help develop community-based long-term stormwater plans and/or integrated plans that will serve as national models. We will leverage the lessons learned from these efforts to share helpful information related to lowering barriers to long-term water infrastructure planning, making progress on human health and water quality objectives, and decreasing the costs of both stormwater and wastewater management.

This work assignment will include supporting technical assistance projects with up to five communities. The technical assistance will include meetings with communities, permitting authorities, and other federal, state, and local stakeholders. Support will be provided to communities as they develop draft long-term stormwater plans and engage in analyses and evaluations necessary to assess long-term stormwater and wastewater planning options in their communities. Ultimately a public outreach report will be developed for each technical assistance project that describes the project and highlights how the example, tool, or process can be applied to or implemented in the selected community as well as other communities.

As part of this technical assistance, communities will be "beta testing" the new stormwater planning concepts and a toolkit (to be shared by EPA), so support may also be needed in compiling comments from the beta testing and identifying opportunities to improve the tool. In addition, references and resource gaps/needs may be identified during the beta testing and the contractor may be asked to research possible tools and references that could be added to the toolkit in the future.

## **II. TASK DETAIL:**

The contractor shall perform the following tasks:

### **Task 0 - Work Assignment Management**

The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70).

The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two (2) hours per month to discuss work assignment issues. The contractor shall provide a status update for tasks via email before each meeting and an update of expenditures. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for approximately three (3) meetings per month.

### **Task 1 – Technical Assistance Support**

Under this Task the contractor shall provide technical support based on stormwater planning concepts and the Integrated Planning Framework for five community partners. EPA will work with each recipient community to define a technical assistance project that will a) serve EPA in developing practical examples, knowledge and resources on integrated planning and long-term stormwater planning that can be transferred to other communities and to a national audience, and b) advance the implementation of stormwater and/or wastewater planning in the selected community. The technical assistance projects will include the development of certain elements of an integrated plan and/or long-term stormwater plan identified in the individual project workplans approved by the EPA WACOR.

The EPA WACOR will provide technical direction whenever necessary to the contractor to indicate the scope and schedule of each technical assistance project. Anticipated tasks may include:

#### ***Task 1A – Meeting Support***

The contractor shall participate in planning meetings with the communities and related federal, state, and/or local stakeholders. There will be regular conference calls with stakeholders. There may also be travel necessary to the communities to engage in meetings and help facilitate stakeholder engagement in the plan development process. The contractor can assume five non-local trips will be required during this period of performance to destinations that could include five states (Mississippi, Iowa, New Hampshire, Pennsylvania, and New Mexico).

Deliverables: The contractor shall prepare meeting agendas and submit for EPA review and approval 2 weeks prior to the meeting and deliver draft meeting notes as directed by

the EPA WACOR for calls and meetings held with technical assistance communities and/or other stakeholder groups. Draft notes shall be delivered within five (5) business days after the meeting. Revised notes shall be delivered within five (5) business days of receiving comments from the EPA WACOR.

Assumptions: For planning purposes, the contractor can assume that during this period of performance there will be one meeting per week that requires the contractor to write meeting summary notes.

### ***Task 1B – Technical Analyses***

The contractor shall support technical analyses of stormwater and/or wastewater solutions if the community identifies the need for this support during the project.

Deliverables: During the long-term stormwater or integrated plan development process, EPA may identify analyses that the contractor shall support for the technical assistance community. Analyses could be related to:

- identifying goals of long-term stormwater planning efforts;
- describing any applicable water quality, human health and regulatory issues;
- describing existing stormwater and/or wastewater systems and their performance;
- planning to encourage the active participation of the community in development and implementation of a long-term stormwater plan;
- examining alternatives;
- examining investments and implementation schedules;
- measuring success; and
- improving the long-term stormwater plan.

Specific analyses could include analyzing stormwater and/or wastewater challenges and suggesting design alternatives; evaluating stormwater design strategies; developing planning-level designs; estimating costs to calculate savings; optimizing green infrastructure; analyzing total maximum daily loads and waste load allocations in relation to stormwater and/or wastewater challenges; reviewing permit requirements; calculating stormwater quantity and/or quality benefits from various design alternatives. Technical analysis deliverables and deadlines will be established based on the specifics of each task and will not be required any sooner than five (5) business days after assignment.

Assumptions: For planning purposes, the contractor can assume that during this period of performance there will be 16 technical analyses tasks.

### ***Task 1C – Public Outreach Reports.***

The contractor shall develop a public outreach report or document for EPA for each technical assistance project that describes the project and highlights how the example, tool, or process can be applied to or implemented in the selected community as well as other communities.

Deliverables: The contractor shall deliver a draft report on each technical assistance project to EPA WACOR for review and comment within four (4) weeks of finishing the project. The contractor shall deliver a final report (or another draft if requested) on each

technical assistance project within three (3) weeks of receiving comments on the draft integrated project report from EPA WACOR. All final reports shall be 508 compliant. Assumptions: For planning purposes, the contractor can assume that one (1) public outreach report will be required.

### ***Task 1D – Quick turn-around research and technical support activities***

The contractor may be asked to support quick turn-around tasks from time to time to assist EPA in responding to inquiries from management, technical assistance communities, and others.

Deliverables: Deliverable format will be specific to the task and will be discussed when each task is assigned. Example deliverables may include: an email summarizing research findings on a certain topic, fact sheets, data tables summarizing information that has been collected as part of the technical assistance work, or that is already available to EPA through other means, PowerPoint slides and/or graphics for meetings and presentations, and summaries of feedback from communities on the toolkit. Deliverables and deadlines will be established based on the specifics of each task and will not be required any sooner than two (2) business days after assignment.

Assumptions: For planning purposes, the contractor can assume that during this period of performance there will be 25 quick turn-around tasks.

### ***Task 1E – Communications Support***

The contractor shall provide support in developing communications materials such as graphics for our website, social media graphics, logo work, infographics, or fact sheets.

The contractor shall update the website within 1 week of receiving technical direction. The contractor shall ensure they have final EPA approval before making final 508 compliant version of graphics/documents. If EPA requires additional edits to this final version, the contractor will have 2 business days to make adjustments.

Deliverables: Deliverable format will be specific to the task and will be discussed when each task is assigned, but large full-sized files or images will be requested and any created graphics should be in vector-based file formats unless the WAM agrees to another format. Deliverables and deadlines will be established based on the specifics of each task and will not be required any sooner than three (3) business days after assignment. Example deliverables may include: A draft of fact Sheets/infographics/logos/social media graphics. If EPA requests additional drafts, the Contractor shall deliver within three (3) business days. After EPA sends final comments the Contractor shall deliver a final within 1 week.

Assumptions: For planning purposes, the contractor can assume that during this period of performance there will be 5 requests.

### ***Task 2 – Quality Assurance Project Plan***

EPA requires that all environmental data used in decision making be supported by an approved QAPP. The contractor shall prepare a QAPP or update an approved QAPP as necessary to address any changes or additional tasks within the Work Assignment that are subject to a QAPP as determined by EPA.

**Data Quality Requirements:** The contractor shall develop data quality requirements (DQRs) and methods for achieving them for the data elements in their DELIVERABLES. Descriptions of data quality requirements (DQRs) and methods for achieving these DQRs developed under this work assignment shall be added to the Office of Water DQR library for use in developing QAPPs for future projects. Such descriptions of DQRs and methods for achieving them shall be the property of EPA.

**Deliverables:** A QAPP that describes the contractor's plan for:

- Identifying the data elements for any data-related activities, and for each of these data elements identifying either (i) the data quality requirements (DQRs) or (ii) the policy that states DQRs are not required,
- Describing their methods for achieving the DQRs, and
- Assuring any environmental data contained in the deliverables shall (i) be of sufficient quality for their intended primary uses and (ii) have adequate quality documentation for determining whether these data are of sufficient quality for future secondary uses.
- Quarterly progress reports that (a) describe the contractor's progress on implementing the QAPP and resolving old data quality issues, (b) describe any new issues, and (c) provide the LOE and cost expenditures for developing the QAPP.

An approved QAPP is required before starting work under Tasks 1B through 1E.

**QAPP Submittal:** A QAPP should be submitted within 15 days of work plan approval.

### **III. MISCELLANEOUS**

#### **A. Software Applications and Accessibility.**

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Files that are available on the website will be delivered to the contractor. Web-based intranet and internet information and applications. See: <http://www.section508.gov>.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual graphic file (.bmp, .gif, .jpeg, .tif, .png files preferred – Contractor shall deliver full-sized images or vector-based graphics unless otherwise requested.)
- Preferred portable format: Adobe Acrobat, Version 6.0

#### **B. Travel.**

Local travel is expected for this work assignment for contractors to attend meetings at EPA. For estimating costs, the contractor can assume one trip to EPA may be required per month. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place.

Non-local travel is also expected for this work assignment for contractors to attend meetings with the technical assistance communities. For the purposes of estimating costs, the contractor can assume five non-local trips will be required during this period of performance to destinations that could include the following states (Iowa, New Mexico, Mississippi, New Hampshire, and Pennsylvania).

### **C. Conference/Meeting Guidelines and Limitations:**

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than \$20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR.

Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

### **D. Contractor identification**

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

### **E. Technical Direction**

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction shall be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum shall be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

## **F. Management Controls**

All printing shall be in accordance with clause H.2 (Printing) of the contract.

## **G. Reporting Requirements**

Reports shall be submitted in accordance with the reporting requirements of the contract. In addition, the contractor shall maintain telephone contact with the EPA WACOR to advise of progress and problems as needed. All documents shall be delivered in Microsoft software applications in accordance with Section III. Miscellaneous, Subsection A of this PWS.

The contractor shall be prepared to submit for inspection copies of all work in progress any time as directed by the WACOR. Wherever practicable, all written materials submitted to EPA must be doubled-sided and on recycled paper. All computer disks submitted to the EPA WACOR shall be scanned for, and identified as free from viruses.

The contractor shall submit drafts and final products in electronic and/or hard copy as well as on the appropriate size disk in a format compatible with Office of Wastewater Management hardware.

The Contractor shall provide the WACOR with a breakout of dollars spent on separate community projects on at least a quarterly basis and when requested by WACOR.

## **H. Guidance Regarding Writing for EPA**

EPA products are to conform to EPA standards. Please reference EPA Stylebook <http://www2.epa.gov/stylebook>. Note also that EPA utilizes AP Style first (<http://www.apstylebook.com>) and U.S. Government Printing Office Style Manual second (<http://www.gpo.gov/fdsys/search/pagedetails.action?granuleId=&packageId=GPO-STYLEMANUAL-2008&fromBrowse=true>)

## **VII. QUALITY ASSURANCE SURVEILLANCE PLAN**

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment.

## **VIII. RELEASE OF DATA AND INFORMATION**

All information collected and developed under this Agreement is the property of the U.S. EPA

and may not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.



<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 2-10				
						<input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number: 000001				
Contract Number EP-C-14-014			Contract Period   07/17/2014   To   02/13/2017 Base                      Option Period Number      2			Title of Work Assignment/SF Site Name Stormwater Technical Assist				
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW 3.4					
Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval						Period of Performance  From   10/11/2016   To   02/13/2017				
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Work Assignment Manager Name   Rachel Herbert						Branch/Mail Code:				
_____ (Signature)    (Date)						Phone Number: 202-564-2649				
						FAX Number:				
Project Officer Name   Robin Danesi						Branch/Mail Code:				
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Other Agency Official Name						Branch/Mail Code:				
_____ (Signature)    (Date)						Phone Number:				
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Contracting Official Name   Kathleen Rechenberg						Branch/Mail Code:				
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						FAX Number:				